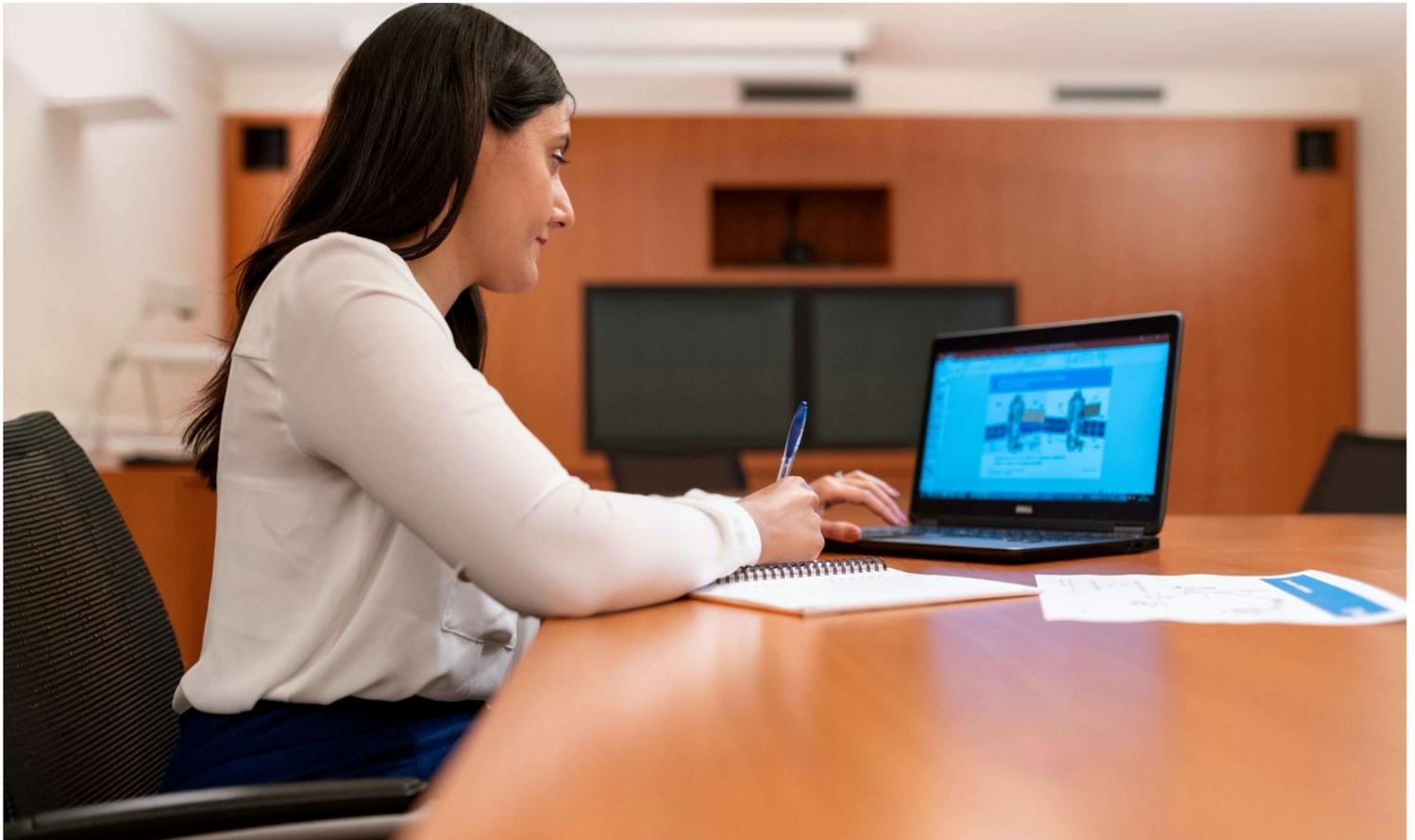


Virtual Operations

◆ *Welcome to the Team* ◆

Onboarding & Plan



PREPARED BY: Turning Point HCM

President CEO / Turning Point

www.TurningPointHCM.com

Rick@TurningPointHCM.com



Table of Contents

Overview - Virtual Assistant	3
Frequently Asked Questions - VA	4
Benefits of Hiring a Virtual Assistant	5
Services - Virtual Assistant	6
Overview - Virtual Digital Media Specialist	7
Frequently Asked Questions - VDM	8
Benefits of Hiring a Virtual Digital Media Specialist	9
Services - Virtual Digital Media Specialist	10
Digital Media Samples	11
Services Assessment Workbook	12
Next Steps	19



Overview

Virtual Administration Assistant

A Virtual Administrative Assistant is an individual available for hire to assist with all of your administrative needs. Hiring an administrative assistant allows you to focus on the other important aspects of your business. This individual can assist with your day-to-day office tasks, all while being remote.



Frequently Asked Questions

Questions for your business needs:

Before engaging a Virtual Administration Assistant it is important to understand the needs and here are some questions we are commonly asked:



How many hours each week do you envision needing help?

We can offer services from 1 to 40 hours each week



What roles can they do?

Refer to the Benefits pages for a more detailed role information



How will this save me money?

By eliminating having an employee in office you are able to utilize just the hours needed as we bill down to the minute for simple tasks



Benefits of a Virtual Administration Assistant

- You will be given one point of contact, yet you are gaining the support of an entire team. The benefit to this is that you effectively eliminate "putting all of your eggs in one basket." You won't have to worry about missing deadlines, and it can finally be somebody else's job to ensure things don't fall through the cracks. Don't wait another day to feel the weight lifted off of your shoulders. Get started today!
- Hiring a remote assistant could alleviate concerns about excessive office fraternization. Our employees are chosen and trained to follow honorable guidelines, and we have every confidence in the individuals that you will be paired with.
- After the shock to businesses in early 2020, we have all seen how unexpected events can affect every single part of our business. You may be trying to think of ways to avoid being caught off guard in other unprecedented future events. If so, making the switch to using remote workers for jobs that can be easily outsourced could be one way to alleviate that stress.
- Cost Savings. You decide how hands-on your Virtual Administrative Assistant will be. You can choose the amount of time you want your Virtual Administrative Assistant to dedicate to your business, and pay them only for the work they are doing for you. You won't have to pay another employee a salary, and worry about all of the secondary overhead that comes with that. See below for more detailed information about cost saving through Virtual Administrative Assistants.



General VA Services

Some of the roles can we help with:



- Email Generation/ Follow Ups
- Client Intake and Setup
- General Follow Ups (i.e. clients/customers, outstanding invoices, etc.)
- Content Organization
- Event/Meeting Scheduling
- Routine Projects



- Social Media Assistance
- Company Branding
- Daily Tasks
- Handle Projects As They Arise
- Anticipate Your Needs
- Travel Arrangements
- CRM management
- Document Creator/ Cleanup



- File Maintenance
- Create/Review Presentations
- Conduct Research
- Generate Reports
- Transcriptions
- Light bookkeeping filing
- Assistance with Organization





Overview

Virtual Media Specialist

Do you know how your company compares with your competitors? If someone searches the internet for your services, is your company easy to find and recognize? If the answer is no, or you know know the answer, you may benefit from hiring a Digital Media Specialist. For a job almost exclusively dealing with the online world, why not hire a remote individual to handle your company's specific digital media needs? This is an increasingly important and growing job field, as social media is getting more popular by the day. You will want a professional who can keep up with the changing trends and make sure your company doesn't fall behind!



Frequently Asked Questions

Questions for your business needs:

Before engaging a Virtual Digital Media Specialist it is important to understand the needs and here are some questions we are commonly asked:



How many hours each week do you envision needing help?

We can offer services from 1 to 40 hours each week



What roles can they do?

Refer to the Benefits pages for a more detailed role information



How will this save me money?

By eliminating having an employee in office you are able to utilize just the hours needed as we bill down to the minute for simple tasks. As a Digital Specialist is rarely a full time for a SME it saves you time and money on hiring

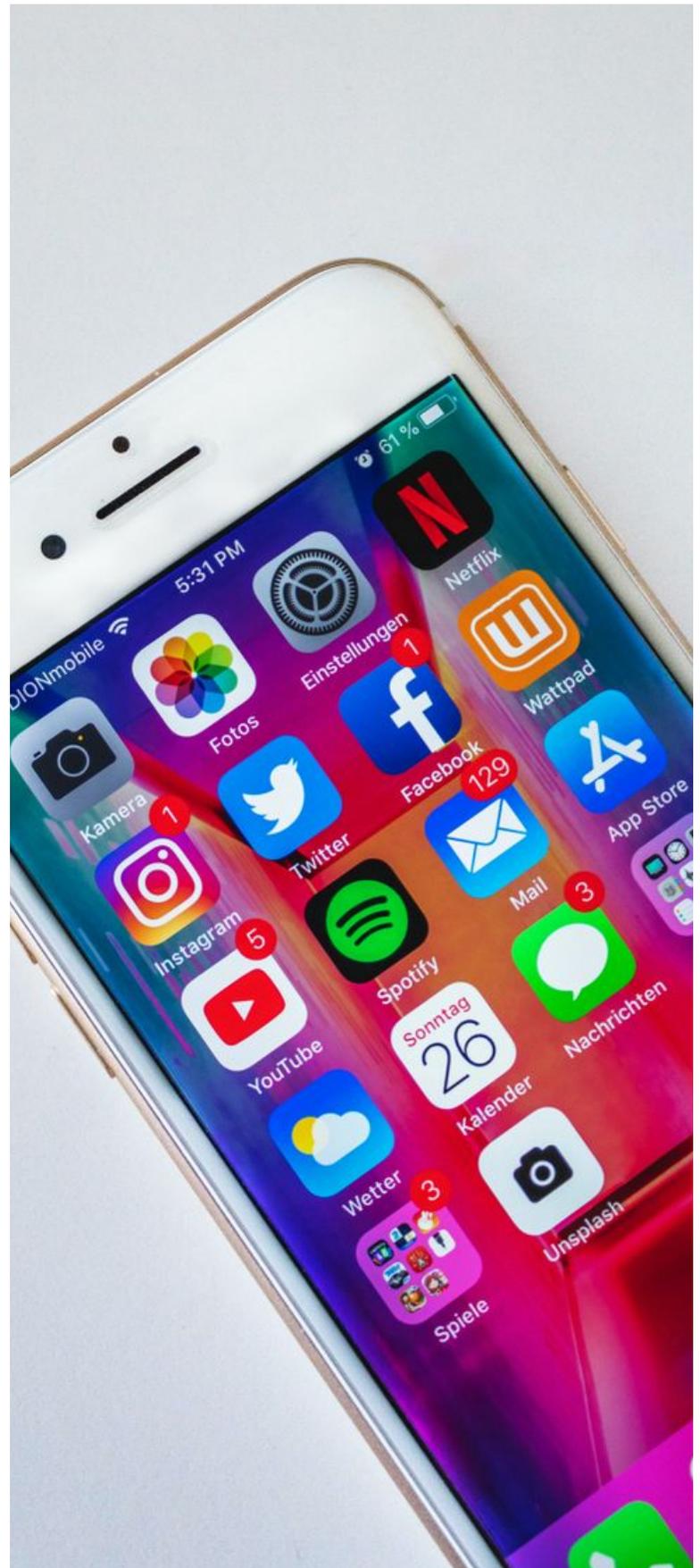


Benefits of a Virtual Digital Media Specialist

- You will be given one point of contact, yet you are gaining the support of an entire team. The benefit to this is that you effectively eliminate "putting all of your eggs in one basket." You won't have to worry about missing deadlines, and you will have a group of people behind you for support. Don't wait to start building, or expanding, your brand. Get started today!
- Hiring a remote Digital Media Specialist could alleviate concerns about excessive office fraternization. Our employees are chosen and trained to follow honorable guidelines, and we have every confidence in the individuals that you will be paired with.
- After the shock to businesses in early 2020, we have all seen how unexpected events can affect every single part of our business. You may be trying to think of ways to not be caught off guard in other unprecedented future events. If so, making the switch to using remote workers for jobs that can be easily outsourced could be one way to alleviate that stress. Additionally, your remote Digital Media Specialist can make sure your company stays relevant and public under any circumstances.
- Cost Savings. You decide how hands-on your Virtual Digital Media Specialist will be. You can choose the amount of time you want your Virtual Digital Media Specialist to dedicate to your business projects, and pay them only for the work they are doing for you. You won't have to pay another employee a salary, and worry about all of the secondary overhead that comes with that. See below for more detailed information about cost saving through Virtual Digital Media Specialist.

General VDM Services

- Digital Media Content Creation
- Collaboration with Your Marketing/Sales/Promotions Team
- Improve Brand Presence
- Track and Compare Your Company Presence with your Competitors
- Campaign Creation
- Web Design/Redesign
- Put Your Company Stamp on your Marketing Strategies
- Email Marketing
- Build contact lists from past clients/customers
- Organize current client/customer/contact lists in order to send targeted messages to different groups of people
- Prepare Advanced Marketing Calendars
- Schedule weekly check-ins to address current and future marketing plans
- Build on existing social media accounts or create from scratch





TURNINGPOINT
Your Business. Your Freedom.

YOU CAN HAVE ACCESS TO OUR OPERATIONS TEAM THROUGH OUR VIRTUAL BOOKKEEPERS



I NEED TO FOCUS ON OTHER ASPECTS OF MY BUSINESS

ARE YOU LOSING MONEY BECAUSE YOUR BOOKKEEPING HAS TAKEN A BACK SEAT?



TURNINGPOINT
Your Business. Your Freedom.



TURNINGPOINT
Your Business. Your Freedom.

Utilize our Virtual Bookkeepers for help with your company's finances



You can cut your operating costs by using a Virtual Bookkeeper

TURNINGPOINT
Your Business. Your Freedom.

1. What social media accounts do you currently use?
 - a. LinkedIn
 - b. Facebook
 - c. Twitter
 - d. Instagram
 - e. Other
2. How often are you using these accounts? Are you a hardcore user, have accounts but don't post often, receive comments/messages from clients and prospective clients?
 - a. LinkedIn:
 - b. Facebook:
 - c. Twitter:
 - d. Instagram:
 - e. Other:
3. On a scale of 1 to 10, how developed are your social media accounts?
 - a. LinkedIn:
 - b. Facebook:
 - c. Twitter:
 - d. Instagram:
 - e. Other:
4. What type of content do you post?

5. Who holds your accounts/stores your passwords?

6. How will we share content/documents?

7. How many connections/followers do you have?
 - a. LinkedIn:
 - b. Facebook:
 - c. Twitter:
 - d. Instagram:
 - e. Other:
8. Do you have 10 people or more that we can tag in posts going forward?

9. Do you use Buffer/Hootsuite/automated scheduling services?
- Yes No
 - If yes, please provide login details:
10. Do you have a color scheme/brand presence for your Company?
- Yes No
 - If yes, what is it? Logo?
11. How many products/services do you want to share/post about?
12. What are you “Pain Points”/”Sales Points” for those services? See sample from Turning Point HCM:
- “Pain Points” –
 - I want to make sure my employees are safe at work.
 - How do I train my employees with everyone remote?
 - I do not want my business, or my employees left behind.
 - “Sales Points” –
 - Flexibility - Employees can train on their own time using our Learning Management System (LMS)
 - Scalable - We can train employees across the entire country
 - Content - We offer more than 180 courses
13. Do you have a contact form on your website?
- Yes No
 - If yes, what are you doing with that information?
14. Do you have multiple websites/links that you would like to use in social media posting?

15. How often would you like to post to each social media site?

- a. LinkedIn:
- b. Facebook:
- c. Twitter:
- d. Instagram:
- e. Other:

16. Do you have a YouTube page?

- a. Yes No
- b. If yes:
 - Is it active?
 - How often used?
 - What types of videos get posted?
 - Who runs the account?

17. Do you have direct competitors?

- a. Yes No
- b. If yes, who/what are they?

18. Do you have an aesthetic in mind?

- a. Yes No
- b. If yes, what is it? Samples?

1. Do you use an emailing service?
 - a. Yes No
 - b. If yes:
 - i. What platform?
 - ii. Login details:
 - iii. How often do you send emails?
 - iv. How many contacts?
 - v. Do you have targeted/segmented lists?
 - vi. How did you acquire these contacts/lists?
 1. Friends/Family
 2. Clients/Customers
 3. Past Clients/Customers
 4. Centers of Influence
 5. Co-workers
 6. Other:
2. Do you have a CRM/Customer Relationship Management system?
 - a. Yes No
 - b. If yes:
 - i. What platform?
 - ii. Would you like us to have access to this?
 - iii. How do you use your CRM?
 - iv. What information from your clients/contacts/customers do you gather?
3. How often would you like to send emails?

Virtual Administrative Assistant

1. How many hours per week do you think you need VA services?

2. During what hours would you like these services?
 - a. Set Schedule:
 - b. Ad Hoc:
 - c. Combination/Other:
3. Do you want your VA to use our email addresses or would you provide us with an email address for your Company?

4. What platforms do you use?

5. Do you have a secure email system?
 - a. Yes No
 - b. If yes, what system do you use?
6. Do you have a video conference account?
 - a. Yes No
 - b. If yes, what do you use?
7. Where are your Company documents stored? Will we have access to these?
 - a. Google Drive:
 - b. SharePoint:
 - c. Device Hard Drive:
 - d. Other:
8. Check the services you are interested in below and how often you think these services should be performed:
 - a. Email Generation

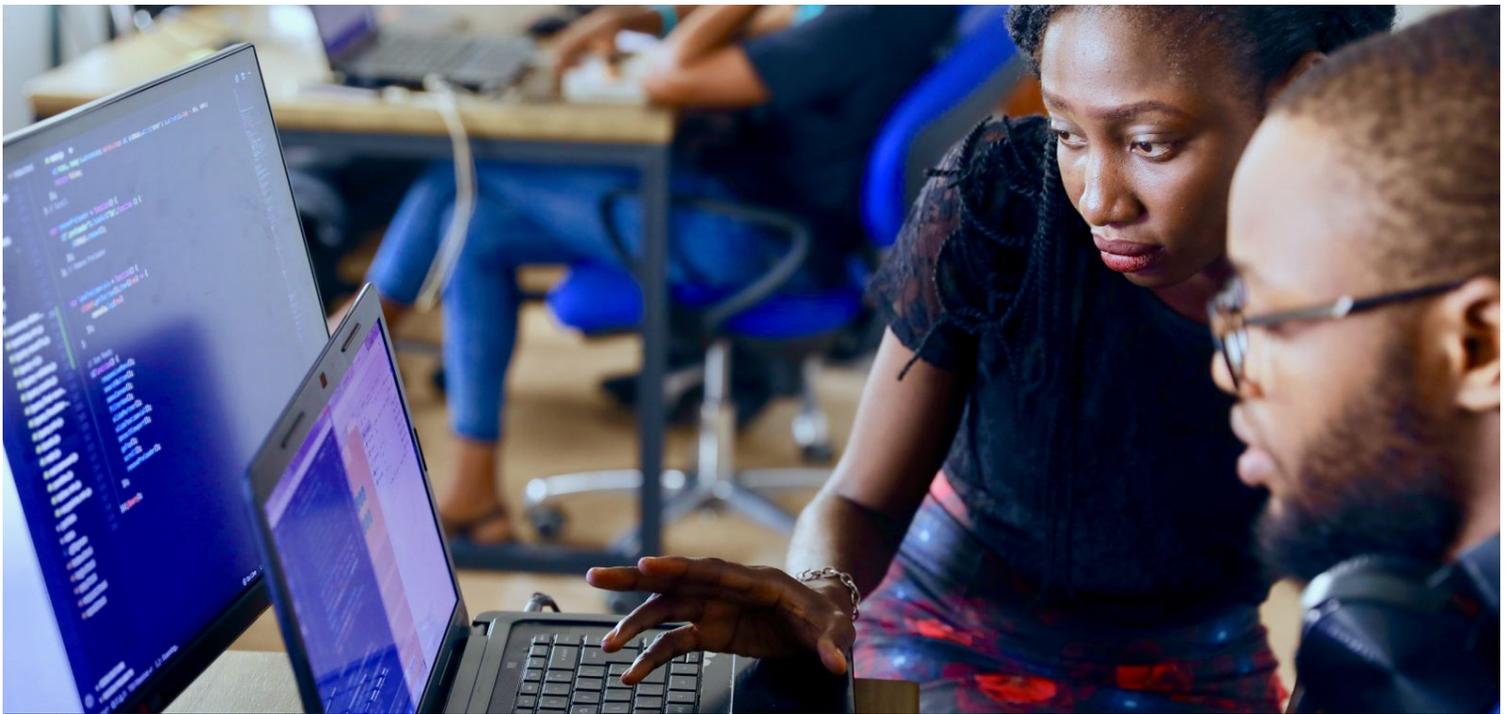
 - b. General Follow Ups (clients, customers, event confirmations, outstanding invoices, etc.)

 - c. Event/Meeting Scheduling

 - d. Creating a Minutes Log for Meetings

- e. Client/Customer Intake and Setup
- f. Routine Projects
- g. CRM Management
- h. Document Creation/Cleanup
- i. File Maintenance
- j. Create/Review Presentations
- k. Generate Reports
- l. Organizational Assistance
- m. Restructuring Tasks
- n. Making Travel Arrangements
- o. Anticipating Your Needs
- p. Conduct Research
- q. Content Organization
- r. Other, specify:

9. How will we share content/documents?



Next Steps



Weeks 1 - 4: Two Weekly Client Check-Ins

1. Status Update Meetings - with Turning Point Executive Team
2. Upcoming Weekly Plan - with Turning Point Digital Team

Weeks 5+: One Weekly Client Check-In

Combined Update/Planning Meeting



Internal Check-Ins

Weekly Check-Ins between Internal Turning Point Teams



Sharing of Accounts/Passwords

Gather a List of All Accounts/Passwords That Are Needed



First Task Deadline

Agree Upon Deadline for First Task